

NOTICE TO OFFERORS

SOLICITATION NO. TIRNO-98-R-00039
AMENDMENT NO. 0003

TO ALL OFFERORS:

Attached are the following documents to the Electronic Research Service Solicitation:

1. Amendment 0003,
2. Questions and responses (numbers 1 through 92), and
3. The revised spreadsheet, Exhibit B, Master Pricing Worksheet to Section B Pricing of the Electronic Research Services (ERS) Solicitation. **(BE SURE TO DOWNLOAD THE LATEST EXCEL SPREADSHEET ON THE ERS WEB PAGE)**

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT ID CODE		PAGE OF PAGES	
2. AMENDMENT/MODIFICATION NO.		3. EFFECTIVE DATE		4. REQUISITION/PURCHASE REQ. NO.		5. PROJECT NO. <i>(If applicable)</i>	
6. ISSUED BY		CODE		7. ADMINISTERED BY <i>(If other than Item 6)</i>		CODE	
8. NAME AND ADDRESS OF CONTRACTOR <i>(No., street, county, State and ZIP Code)</i>				(X)		9A. AMENDMENT OF SOLICIATION NO.	
						9B. DATED <i>(SEE ITEM 11)</i>	
						10A. MODIFICATION OF CONTRACT/ORDER NO.	
						10B. DATED <i>(SEE ITEM 11)</i>	
CODE		FACILITY CODE					

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers
☐ is extended, ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. **FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER.** If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA *(If required)*

**13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.**

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: <i>(Specify authority)</i> THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES <i>(such as changes in paying office, appropriation date, etc.)</i> SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER <i>(Specify type of modification and authority)</i>

E. IMPORTANT: Contractor ☐ is not, ☐ is required to sign this document and return _____ copy to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION *(Organized by UCF section headings, including solicitation/contract subject matter where feasible.)*

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER <i>(Type or print)</i>		16A. NAME AND TITLE OF CONTRACTING OFFICER <i>(Type or print)</i>	
15B. CONTRACTOR/OFFEROR		16B. UNITED STATES OF AMERICA	
15C. DATE SIGNED		16C. DATE SIGNED	
<i>(Signature of person authorized to sign)</i>		<i>(Signature of Contracting Officer)</i>	

The following changes are hereby incorporated into solicitation no. TIRNO-98-R-00039:

1. Delete Section 2.5 in its entirety and replace with the following:

2.5 PERIOD OF PERFORMANCE:

The projected period of performance for this procurement consists of one base year with three one-year optional periods of performance as follows:

Base Period:	April 1, 1999	through	March 31, 2000
Option Period 1:	April 1, 2000	through	March 31, 2001
Option Period 2:	April 1, 2001	through	March 31, 2002
Option Period 3:	April 1, 2002	through	March 31, 2003

The period of performance is based on a projected contract award date of April 1, 1999, and will be revised accordingly at contract award.

Training should commence within 30 days after contract award. Training should be completed within thirty days after commencement.

2. Add Subsection 13 to Solicitation Section 3.8.1 to read as follows:

Section 13 – Inventory Listing Worksheets

In this section, the Offeror shall provide the completed Inventory Listing Worksheets (Section C, Exhibit C). Please note: The Inventory Listing Worksheets are not included in the technical proposal page limitation of 200.

3. Delete the first paragraph at Section 3.8.2, Volume II, Business Proposal, Subsection 6, Price Proposal, in its entirety, and replace with the following:

In this section, the Offeror shall provide its detailed price proposal prepared in accordance with Section B of this RFP (Attachment 3.20), including all required Tables/Exhibits. The Offeror shall also provide a copy of applicable current GSA schedules or commercial price lists.

4. Add Subsection 3.8.3 to section 3.8 as follows:

3.8.3 Alternate Price Proposals

The Government is looking for the solution that provides the best value to the Internal Revenue Service over a potential 4-year period. Therefore, the Government will accept alternate price proposals. The price for any alternate proposal must conform to the performance period stated in the RFP – a base year and three option years. Alternate proposals must be priced in a manner that allows the Government to readily identify and evaluate the proposal pricing data. Alternate proposals will be evaluated based on the evaluation criteria detailed in the RFP.

The alternate proposal shall contain Exhibit C as Table 1, to show the individual component prices. In the event that there is no charge for an item, the Offeror shall so stipulate by placing the acronym “N/C” in the appropriate description column. In an instance where “N/C” is entered, the Government will have the right to order that item from the successful Offeror at no charge to the Government. In the event that there is an item proposed, that is not separately priced, the Offeror shall so stipulate by placing the acronym “NSP” in the appropriate description column.

The Offeror shall prepare a cross reference table, Table 2, which indicates where, in the alternate proposal, each requirement in Section C is priced. The Offeror shall submit Table 1 in hardcopy and on diskette. All requirements in Section C must be addressed in Table 1, clearly identifying the proposal line item that satisfies the requirement.

5. Delete the second paragraph at Solicitation Section 3.14.1.2, in its entirety, and replace with the following:

The purpose of the additional editorial/analytical package (which compiles, digests and interprets the various sources of authority constituting the law of federal income, excise & estate and gift taxation) is to gain differing and contrasting viewpoints without the cost of duplicating access to the underlying source documents. Therefore, the awardee for Group #1 will not be considered for award of Group #3, unless the editorial and/or analytical tool is not related to the same tool as proposed for Tax Package #1.

6. Delete the first sentence of paragraph (a) at Section 3.14.4, Point Scored Evaluation, and replace with the following:

a. The total points available for highly desirable electronic research features (Statement of Work Section C.3) and support services (Statement of Work Section C.4) per platform, per tax package, is 294, plus an additional .2 for each point allocated to the Windows platforms.

7. Delete the third sentence of paragraph (a) at Section 3.14.4, Point Scored Evaluation, and replace with the following:

“The 294 points are listed in descending order of importance as follows:”

8. Delete “Customized Databases (Statement of Work, Section C.3.11): 6 points” from Section 3.14.4, paragraph (a).

9. Section 3.14.4, paragraph (b): Increase the total points available in Tax Package #8, Employment Tax Package, in Award Decision #1, from 10 to 12.

10. Section 3.14.4, paragraph (b): Increase the total points available in Tax Package #7, Excise Tax Package, in Award Decision #1, from 6 to 8.

11. Section 3.14.4, paragraph (b): Increase the total points available in Tax Package #6, Estate & Gift Tax Package, in Award Decision #2, from 1 to 3.

12. Section 3.14.4, paragraph (b): Increase the total points available in Tax Package #5, Coordinated Examination Program Package, from 0 to 2.

13. Delete the last paragraph in Section 3.14.4, paragraph (b), in its entirety and replace with the following:

Please note: Tax Package #1 (Core Tax Package) and Tax Package #14 (Office of Criminal Investigation Package) do not have extra points available for data within the packages. The requirements within these two packages are all minimum, mandatory requirements.

- 14. Section 3.18, Past Performance, last paragraph: Delete this paragraph in its entirety and replace with the following:**

The Offeror is responsible for ensuring that correct information is provided for each case, especially for each point of contact person. Only two attempts will be made to contact the appropriate person for each client or customer. In the event that no information is received within the requested time after the second attempt, then it will be noted that no past performance observation was received from the particular client or customer. If any one or more of the three randomly selected references are not reached, one or both of the other two references will be contacted.

- 15. The Statement of Work (Section C) takes precedence over Section 3.19 and the Exhibits.**

- 16. Delete Section B.1.4 in its entirety and replace with the following:**

B.1.4 Vendors submitting prices for CD-ROM network products shall submit pricing based on delivering two copies (one original and one back-up) of each CD-ROM (including updates) to each of the five Internal Revenue designated sites.

- 17. Delete Section B.1.7 in its entirety and replace with the following:**

B.1.7 Product number 11 is a stand-alone CD-ROM tax research product. Vendor pricing should include delivery to the 34 IRS District Offices, the 16 largest Posts of Duty (PODs) and the National Office.

- 18. Delete Section B.1.10 in its entirety and replace with the following:**

B.1.10 Exhibit B is the Master Pricing Worksheet for all packages and platforms. Exhibit B is broken down into spreadsheets, one per tax package, and contains an estimate of baseline (BL) concurrent users for evaluation purposes for the base year and the three option years. Vendors shall propose prices on a monthly concurrent-user rate for each platform within each package proposed for the base year and the three option years.

The revised Exhibit B spreadsheets are contained in one (1) MS Excel file. This file contains a total of fifteen (15) worksheets. Worksheets 1-14 coincide with each of the fourteen tax packages contained in Section C of the solicitation. Worksheet 15 is a spreadsheet that automatically computes the grand totals from worksheets 1-14.

For Exhibit B, the Master Pricing Worksheet, place a zero dollar (\$0.00) value for any base line item that no dollar amount is being proposed. This will eliminate the “# value” message in any unpopulated base line item and will allow the spreadsheet to compute the evaluated totals.

- 19. Delete Section B.1.11 in its entirety and replace with the following:**

B.1.11 Exhibit C, Detailed Pricing Worksheet – Complete these worksheets for all packages proposed, on all products and for all platforms, i.e. DOS, WIN, Internet and CD-ROM. A detailed

pricing breakdown shall be provided for each specific sub component of Packages 2,3,4,5,6,7,8,9,10,12,13,and 14. The sum total rollout figures shall be transferred to Exhibit B, the Master Pricing Worksheet. The information in Tax Package #1, the “Core Tax Package” and Tax Package #11, “Standalone CD-ROM Package,” lend themselves to providing a “Bottom Line” figure for all the tax components, however, a breakdown of (1) Training Cost, (2) Editorial Support Cost, and (3) Technical Support Cost for both packages is also required. The sum of these four lines shall be rolled up to the “Master Pricing Worksheet.” Vendors shall propose prices on a monthly concurrent-user rate for each platform within each package proposed for the base year and the three option years.”

20. Delete Exhibit B, Master Pricing Worksheet, in its entirety, and replace with the revised Exhibit B, Master Pricing Worksheet, which is provided electronically with this amendment.

21. Delete Section C.1.4.1.5 in its entirety and replace with the following:

C.1.4.1.5 Provides on line research of the Internal Revenue Manual (IRM)

22. Revise the Statement of Work at Section C.1.4 to change the second set of numbering of C.1.4.1.2 through C.1.4.1.9 to read C.1.4.2 through C.1.4.9.

23. Delete Section C.2.2.1.1 in its entirety and replace with the following:

C.2.2.1.1 A published analytical and/or explanatory tax service which compiles, digests and interprets the various sources of authority constituting the law of federal income, excise and estate & gift taxation.

24. C.2.2.10.2, “United States Tax Court (Regular and Memorandum Decisions)” and C.2.2.10.3, “Tax Court of the United States (Regular and Memorandum Decisions)” refer to the same requirement. These titles are used interchangeably, so both have been provided. A vendor may cite both C.2.2.10.2 and C.2.2.10.3 in responding to this requirement.

25. Add Section C.2.3.1.3.9 to the Statement of Work to read as follows:

C.2.3.1.3.9 Reserved

26. Delete Section C.2.6.1.7 in its entirety and replace with the following:

C.2.6.1.7 Books/Treatises/Magazines that are tax related

27. Change Section C.2.6.1.8 (BNA Tax Management Portfolios’ Foreign Series) from a mandatory requirement to a highly desirable feature. One point is assigned to Section C.2.6.1.8.

28. Change Section C.2.6.1.8.1 (BNA Banking Daily) from a mandatory requirement to a highly desirable feature. One point is assigned to Section C.2.6.1.8.1.

29. Delete Section C.2.7.1 in its entirety and replace with the following:

C.2.7.1 The Estate & Gift Tax Package includes materials primarily of use to attorneys auditing estate tax returns, fiduciary returns, and gift tax returns. Users of this package will also receive the “Core Tax Package.” The tax materials included in this package are considered highly desirable except for State Codes and State Court Cases, which are mandatory.

Note: One (1) point can be earned for each of the three highly desirable line items:

C.2.7.1.4 Treatises on Estate & Gift Taxation (1 point)

C.2.7.1.5 BNA Tax Management Portfolios’ Estates, Gifts and Trusts Series (1 point)

C.2.7.1.6 Relevant Periodicals (1 point)

For a total of three possible points.

30. Delete Section C.2.8.1.1 in its entirety and replace with the following:

C.2.8.1.1 A reference guide or handbook covering Excise taxes

31. Add Section C.2.8.1.2 to read as follows:

C.2.8.1.2 Books/Treatises

32. Add Section C.2.8.1.3 to read as follows:

C.2.8.1.3 Magazines/Newsletters

Note: One (1) point can be earned for C.2.8.1.2 (Books/Treatises) and one point can be earned for C.2.8.1.3 (Magazines/Newsletters). The Excise Tax Package is revised to increase the total points available from 6 to 8.

33. Add Section C.2.9.1.3 to the solicitation to read as follows:

C.2.9.1.3 Books/Treatises

34. Add Section C.2.9.1.4 to the solicitation to read as follows:

C.2.9.1.4 Magazines/Newsletters

Note: One (1) point can be earned for C.2.9.1.3 (Books/Treatises) and one point can be earned for C.2.9.1.4 (Magazines/Newsletters). The Employment Tax Package is revised to increase the total points available from 10 to 12.

35. Delete Section C.2.12.2.11 in its entirety and replace with the following:

C.2.12.2.11 Market Segment Specialization Program Audit Technique Guides (MSSPATG’s)

36. Add Solicitation section C.2.15.2.1 to read as follows:

C.2.15.2.1 Reserved

37. Add the following to the end of Section C.3.1.1:

The IRS currently uses Netscape 3.01 and Microsoft Explorer for Windows NT 2.0.

38. Delete Section C.3.1.2.1 in its entirety and replace with the following:

C.3.1.2.1 The CD-ROM product(s) must be available on Microsoft DOS, Windows 3.X and Windows NT software platforms. Vendors must certify that they will support the DOS platform through December 31, 1999.

39. Delete Section C.3.1.3.1 in its entirety and replace with the following:

C.3.1.3.1 The product(s) must be available on Microsoft DOS, Windows 3.X and Windows NT software platforms. Vendors must certify that they will support the DOS platform through December 31, 1999.

40. Add solicitation Section C.3.1.3.2.2 to read as follows:

C.3.1.3.2.2 Reserved

41. Delete Section C.3.3.5 in its entirety and replace with the following:

C.3.3.5 It is highly desirable that a desktop utility be provided which automates the creation of links within a working WordPerfect (versions 7 and 8) or MS Word (versions 95 and 97) document (e.g., trial briefs, research memos) by searching for all legal citations and automatically reformatting them into the appropriate format to link to the authority on the applicable CD-ROM, online, or web-based service.

42. Delete Section C.3.11, Customized Databases, from the solicitation in its entirety.

43. Delete Section C.4.3.6 in its entirety.

44. Delete Section C.4.3.15 in its entirety and replace with the following:

C.4.3.15 Training for the base year will occur in approximately 51 locations with "train-the-trainer" instruction for approximately 612 Internal Revenue Service employees. The requirement for training in years 2-4 will be reduced to only training "train-the-trainers" lost through attrition. The IRS anticipates a 10% - 15% turnover of train-the-trainers in the option years and expects the vendors to provide software training in each of the renewal years to these employees.

45. The due date for receipt of proposals is hereby revised from January 29, 1998 at 3:00 p.m., Eastern Standard Time to January 29, 1999 at 3:00 p.m., Eastern Standard Time.

Responses to questions received and the revised spreadsheet, Exhibit B, Master Pricing Worksheet are hereby attached.

REQUEST FOR PROPOSAL NO. TIRNO-98-R-00039

**THE FOLLOWING ARE RESPONSES TO QUESTIONS RECEIVED
REGARDING THIS SOLICITATION:**

1. Question: There seems to be a need for more clarity in regards to “mandatory” and “must have” items in the RFP. There are 3 instances in Section C where the word “mandatory” is used. Section C.2.19 on page 43 states “Minimum Mandatory Specifications,” then reads that “The Minimum Mandatory Specifications are as Follows” and then moves to Section C.1.4.1.8 which discusses Counsel and Appeals’ access to CD ROM. The words “Must Have” are used more frequently. Is there a distinction between “mandatory” and “must have”?

Response: The terms “Mandatory” and “Must Have” are interchangeable and should be interpreted as having the same meaning.

2. Question: The pricing spreadsheets require a price breakdown of all sub components of subscriptions (i.e. revenue ruling vs. legislative history). This is akin to pricing a book by the page or pricing a car by the axle, engine, etc. The car will not run without all the parts, therefore all of the parts are included in the final price. It is virtually impossible to break down the pricing of our libraries by their component parts. In addition, it is not possible to purchase the separate components within a subscription at different concurrent usage levels. Our policy is to provide “bottom line” pricing on all bids (including training costs, technical support, etc.). Is this acceptable or is there another acceptable solution to the pricing issue?

Response: The minimum mandatory requirements and highly desirable features of the 14 tax packages have been reviewed, and two packages can be modified to provide bottom line pricing as follows:

The information in Tax Package #1, the “Core Tax Package” and Tax package #11, “Standalone CD-ROM Package” lend themselves to providing a “Bottom Line” figure for all the tax components, however, we still require a breakdown of (1) Training Cost, (2) Editorial Support Cost, and (3) Technical Support Cost for both packages. The sum of these four lines shall be rolled up to the “Master Pricing Worksheet.”

Section B.1.10 is hereby amended to read as follows: “Exhibit B is the Master Pricing Worksheet for all packages and platforms. Exhibit B is broken down into 14 spreadsheets, one per tax package, and contains an estimate of baseline (BL) concurrent users for evaluation purposes for the base year and the three option years. Vendors shall propose prices on a monthly concurrent-user rate for each platform within each package proposed for the base year and the three option years.”

Section B.1.11 is hereby amended to read as follows: “Exhibit C, Detailed Pricing Worksheet – Complete these worksheets on all products and for all platforms, i.e. DOS, WIN, Internet and CD-ROM. A detailed pricing breakdown shall be provided for each specific sub component of Packages 2,3,4,5,6,7,8,9,10,12,13,and 14. The sum total rollup figures shall be transferred to Exhibit B, the Master Pricing Worksheet. The information in Tax Package #1, the “Core Tax Package” and Tax Package #11, “Standalone CD-ROM Package”, lend themselves to providing a “Bottom Line” figure for all the tax components, however, a breakdown of (1) Training Cost, (2) Editorial Support Cost, and (3) Technical Support Cost for both packages is also required. The sum of these four lines shall be rolled up to the “Master Pricing Worksheet.” Vendors shall propose prices on a monthly concurrent-user rate for each platform within each package proposed for the base year and the three option years.”

3. Question: Pricing is requested for the “the date of the award” until 9/30/99. Is there a specific contract start date that you are targeting?

Response: We anticipate a contract award date of April 1, 1999.

4. Question: The master pricing spreadsheet shows no baseline concurrent user for DOS On-line and only 50 users for DOS CD after 10/1/99. Is this accurate?

Response: The baseline expresses the Service's best estimate of usage based on information available at this time. We anticipate that the HQ 2001 (DOS machines) will be replaced with Windows NT machines and the replacement machines will be used for On-line access.

5. Question: In Section C.3.11.1 you state that you would like the ability to customize databases. Which databases would you need to customize and can you be more specific as to your definition of "customize."

Response: Section C.3.11 is hereby deleted from the solicitation.

6. Question: You are requiring support of platforms which are no longer supported by software manufacturers (DOS 5.0 on HQ2001s). Is there any flexibility in the support of these platforms for the life of the contract? Are we able to phase out DOS support as the laptops are replaced?

Response: We have evaluated the concerns regarding DOS and hereby amend the solicitation to state that vendors must support DOS through December 31, 1999. DOS products will be phased out as soon as employees receive Windows equipment and receive the Windows version software training.

The second sentence at Section(s) C.3.1.2.1 and C.3.1.3.1 is hereby modified to read: Vendors must certify that they will support the DOS platform through December 31, 1999.

7. Question: Are the HQ2001 laptops Y2K compliant? When will all of the HQ2001 laptops be replaced?

Response: All HQ 2001 laptops will be replaced no later than December 31, 1999. All replacement laptops will be Y2K compliant.

8. Reserved

9. Question: Section B.1.4 is not clear as to how many sites will need 10 complete sets of CD ROMs.

Response: Section B.1.4 is hereby revised to read as follows: Vendors submitting prices for CD-ROM network products shall submit pricing based on delivering two copies (one original and one back-up) of each CD-ROM (including updates) to each of the five Internal Revenue designated sites.

10. Question: Why does each site need 10 complete CD-ROM sets?

Response: As stated above, the number of CD-ROM sets per site has been revised from ten to two.

11. Question: Section 2.11 states that “Travel costs associated with the software training will be reimbursed”. Will our trainers be reimbursed for travel costs for training in the 51 specific locations?

Response: As stated in Section 2.11, “Travel costs associated with the software training will be reimbursed in accordance with the Federal Travel Regulations...” This reimbursement will include the Contractor’s instructors.

12. Question: Who are the other companies bidding on the solicitation?

Response: This information cannot be provided.

13. Question: On Exhibit C – What level of detail is needed for the location of the libraries listed? Is the location needed to verify that the documents are available or to locate the actual electronic file on the CD or electronic medium?

Response: The purpose of requesting the location of the libraries is to be able to actually locate the electronic file for technical evaluation, training and research purposes. We have experienced on occasion, that some products assemble information differently and it sometimes becomes difficult to locate.

14. Question: Can we use current IRS customers for the Past Performance Evaluation Report?

Response: This is acceptable.

15. Question: Under C.4.1.2.1, for purposes of this inquiry, should “in house staff” include non-traditional workers such as independent contractors, outside authors, and telecommuting employees who perform editorial functions of a non clerical nature.

Response: The IRS requires the size of the staff proposed to provide editorial support under this contract. The purpose of this requirement is to ensure that Offerors are capable of providing the required editorial support.

16. Question: Is the IRS planning to use existing hardware or should new hardware be included in the solicitation response?

Response: The IRS plans to use existing hardware, CD-ROM Towers, file servers and computers.

17. Question: Is it possible that the IRS may issue a multiple award to more than one vendor for any individual group within the 4 content groups (e.g., could there be more than one vendor awarded a contract to supply the content in Group #2)? Alternatively, is the IRS contemplating a winner-take-all award for each group? Does the IRS expect that there might be users that will need access to multiple groups or packages from a single vendor using a single password?

Response: Only one award will be issued for each of the four award groups. If one vendor is awarded more than one group contract, we would anticipate that only one password would be

assigned to an employee. Offerors are expected to utilize their standard commercial practice for assignment of passwords.

18. Question: There are a few mandatory requirements as well as other requirements, with which exact, to-the-letter compliance is either impossible or extremely costly. For example:

- ♦ Open Market (Folio), Microsoft, and other software proprietors have announced that they will not support DOS applications of their software beyond December 31, 1999, and that such DOS applications will not be guaranteed to be Y2K compliant. Is it mandatory that Offeror's guarantee the availability of their products on DOS platforms for the life of any contract awarded pursuant to this RFP?

Response: We have evaluated the concerns regarding DOS and hereby modify the solicitation to state that vendors must support DOS through December 31, 1999. DOS products will be phased out as soon as employees receive Windows equipment and receive the Windows version software training.

The second sentence at Section(s) C.3.1.2.1 and C.3.1.3.1 is hereby modified to read: Vendors must certify that they will support the DOS platform through December 31, 1999.

19. Question: For the Coordinated Examination Program Package, the IRS has included BNA Tax Management Portfolios' Foreign Series and BNA Banking Daily as mandatory content. It would appear no vendor can comply with this requirement. BNA itself does not provide this data on all of the technical platforms required by the RFP. BNA licenses its contents to several potential Offerors under terms that may prohibit offering this material to the IRS under the requisites set forth in the RFP. Would the IRS consider making this type of content "highly desirable"?

Response: The solicitation is hereby modified to change solicitation sections C.2.6.1.8 and C.2.6.1.8.1 from mandatory requirements to highly desirable features. One point is assigned to C.2.6.1.8 and one point is assigned to C.2.6.1.8.1.

20. Question: Several potential Offerors include third party content in the Offerors products and services. Because this data is owned and controlled by third parties, its availability is not completely within the control of the potential Offerors. While we fully intend to make third party data available to the IRS for the life of the contract, Offerors cannot guarantee this availability due to circumstances beyond the Offerors control. Would the IRS accept a "best efforts" commitment to make this content available through the life of any contract awarded rather than an absolute guarantee?

Response: In order to be considered acceptable for award, Offerors must be able to meet the requirements of the solicitation.

21. Question: For mandatory/highly desirable/general requirements, if an Offeror requests an exception or proposes an alternative deviation or slight modification under Section 9 – Summary of Technical Exceptions and Deviations, will the Offeror's response be automatically disqualified as non-compliant? Will Offerors who propose exceptions, deviations, or alternatives that the IRS deems unacceptable be afforded a chance to "cure" or negotiate with the IRS for an acceptable solution, or will responses containing unacceptable exceptions, deviations or alternatives automatically be eliminated as non-compliant? Will Offeror's be "downgraded" or awarded fewer points for proposing acceptable deviations or alternatives in this regard?

Response: If the Government awards without discussions, any proposal that does not meet the Government's minimum mandatory requirements will be considered unacceptable and will not be eligible for award. If, however, the Government proceeds with discussions, the Government may choose to accept proposed exceptions, deviations or alternatives via contract negotiations and solicitation amendment.

22. Question: With respect to C.1.4.1.3.1 of the Statement of Work, under current corporate policy, this Offeror does not offer customers the option of replicating our Internet products on a customer's internal file server or Intranet. T1 circuits are an available option for accessing our Internet and online products. Therefore, may an Offeror omit the Exhibit C – Inventory Listing Worksheet requirement to disclose disk space and file size for each product line, and instead provide estimates of the disk space and file size at the Group level (e.g. Group #1 would require disk space of approximately 6.3 gigabytes)? This would be done with the understanding that more detailed file size and disk space information would be provided to the IRS if an Offeror were awarded a contract. Will an Offeror be “downgraded” or awarded fewer points if the Offeror responded to the request for disk space and file size information in this proposed manner?

Response: This proposed method is considered acceptable. There are no points associated with solicitation Section C.1.4.1.3.1.

23. Question: Does the IRS have an anticipated date when vendors must begin providing services pursuant to any contract award? If the IRS can not identify a specific start date, could the IRS indicate an earliest possible date or range of dates on which vendors would be required to begin service?

Response: We anticipate a contract award date of April 1, 1999.

24. Question: With respect to training, C.4.3.5 of the Statement of Work requires a training session for each software format. Is it acceptable for a 4-hour training session to include training on more than one software format? This Offeror's commercial training normally provided to commercial clients covers more than one software format in a given 4-hour training session. How soon after contract award will the IRS expect training to commence? Will an Offeror be “downgraded” or awarded fewer points for proposing training in this manner?

Response: As stated in solicitation Section C.4.3.1, the contractor shall provide standard, commercial training support normally provided to commercial clients. If the Offeror's standard, commercially training normally provided to commercial clients covers more than one software format in a given 4-hour training session, this would be acceptable. Training will commence within thirty days after contract award. No additional points are assigned to section C.4.3, Training Support.

25. Question: In the RFP, the IRS is asking for access to be limited to the number of concurrent users, blocks of 50, ordered by the IRS. Does the IRS expect every user to receive a password? In an online environment, what would happen if, for example, the IRS ordered 50 concurrent users from a vendor for a certain package and a 51st user attempts to access the vendor's service? Would the 51st user be blocked from accessing the service and need to re-enter his/her password at a later date? In the alternative, would the 51st user have the option of accessing the online service and be billed on an hourly/transactional basis for that usage?

Response: The number of users may vary from year to year. IRS employees that need access to the electronic research services required under this procurement will require a password. Employees will be profiled based on their job requirements and may be profiled for more than one

group. If an employee was profiled for a group with a limit of 50 concurrent users and was the 51st user to try to access the system, he/she would be blocked from accessing the system until the concurrent users went down to 49, at which time there would be an open port available. The 51st "user" would not have an option of accessing the online service based on an hourly/transactional basis. The IRS Contracting Officer's Technical Representative will monitor the system and work with contractors to determine when an increase or decrease in the number of concurrent ports is warranted.

26. Question: 3.8.2 Section 6-Price Proposal states that the vendors must include "cost or pricing data substantiation." Since this is a solicitation for commercial items utilizing FAR Part 12, cost or pricing data is not required. Do you instead mean data that is "other than cost or pricing data" which is readily maintained by commercial vendors such that a contracting officer can determine price reasonableness? Can you please clarify and confirm our understanding of the type of data the IRS is requiring?

Response: The requirement for Offerors to provide cost or pricing data substantiation is hereby removed from solicitation Section 3.8.2, Subsection 6 – Price proposal.

27. Question: Please clarify what the IRS is defining as CLINs? Is a CLIN at the package total level? Is a CLIN at the different content levels that comprise a package total?

Response: CLINs are at the package total level for a total of 14 CLINs.

28. Question: If an Offeror does not intend to subcontract any of the work required under this RFP, is it acceptable for the Offeror to omit submitting a Small Business Subcontracting Plan?

Response: If an Offeror does not intend to subcontract any of the contract requirements, the Offeror must submit a detailed letter referencing this solicitation, which requests a waiver of the requirement to submit a subcontracting plan. The letter must include an explanation of why the Offeror does not intend to subcontract any of the work required, and the Offeror's intention to perform 100% of the contract requirement in-house. However, prior to submitting a request for a waiver, the Offeror should carefully review its indirect costs (secretarial, clerical, telephone, travel, etc.) to determine if there are any subcontracting opportunities in this area. If so, then a subcontracting plan should be submitted in lieu of a waiver request letter, and the plan submitted would be based on subcontracting indirect costs.

29. Question: It is our understanding that the General Services Administration is no longer requiring a Dun and Bradstreet Past Performance evaluation on its Federal Supply Schedule solicitations. Will the IRS continue to require this evaluation in its current solicitation?

Response: The IRS requires a past performance evaluation for this solicitation.

30. Question: Will all four groups be awarded at the same time?

Response: All four groups will be awarded at the same time.

31. Question: Depending upon your response to several of the questions, we may have additional questions we need to submit. Will it be possible to submit additional questions after the 12/11/98 due date for questions?

Response: Vendors are not precluded from submitting additional questions. The IRS will attempt, but cannot guarantee, that additional questions received will be answered prior to the due date for receipt of proposals.

32. Question: Section B.1.4 states that vendors submitting prices for CD-ROM products should be prepared to deliver ten copies of each CD-ROM to each of the Internal Revenue designated sites. How many designated sites are there in the National Offices? Also, how many ship to locations are there in Award Group 4, Tax Package 11 – CD Standalone?

Response: As stated in the response to question 9 above, Section B.1.4 has been revised as follows: “Vendors submitting prices for CD-ROM network products shall submit pricing based on delivering two copies (one original and one back-up) of each CD-ROM (including updates) to each of the five Internal Revenue designated sites.”

The five Internal Revenue designated sites include four regional sites and one National Office site.

Additionally, solicitation section B.1.7 is hereby revised to read: “Product number 11 is a stand-alone CD-ROM tax research product. Vendor pricing should include delivery to the 34 IRS District Offices, the 16 largest Posts of Duty (PODs) and the National Office.”

33. Question: Section B.1.10 requires us to complete the Master Pricing Worksheets for each product with Baseline and non-baseline pricing. How will you be evaluating the non-baseline prices and to what extent?

Response: The baseline numbers represent the Government’s best estimate of concurrent usage for the electronic research services. The baseline numbers will be used by the Government for price evaluation. However, the Government requires that Offerors also propose non-baseline prices because the Government’s actual number of concurrent users may differ from the current estimate over the life of the contract.

Additionally, please note solicitation Section 3.15.1, Price Analysis: Prices will be analyzed to determine whether they are unbalanced in accordance with FAR 15.404-1(g). Any offer containing prices that are materially unbalanced will be rejected.

34. Question: Section B, Exhibit C, Detailed Pricing Worksheets, do prices for products that do not have baseline concurrent user figures need to be completed?

Response: The detailed pricing worksheets need to be completed for all proposed prices, including baseline and non-baseline concurrent user figures.

35. Question: Section 3.14.4 point Scored Evaluation, Electronic Research Features & Support Features, item b. states a weight factor of 1.2 will be applied to the windows platforms. Does this Windows multiplier of 1.2 apply to all Windows platforms?

Response: Yes

36. Question: Section C.3.1.1 states the platforms required for each award group. Can alternate platforms be used for packages that are not required to be on all 5 platforms? For example, can CD-ROM Windows be substituted for on-line Windows and vice versa? Also,

providing Accounting data on-line may not allow the IRS to take full advantage of the Graphical User Interface.

Response: Alternate platforms cannot be used for packages that are not required to be on all 5 platforms. CD-ROM Windows cannot be substituted for on-line Windows and vice versa. Offerors must be capable of providing the required platforms in order to be considered technically acceptable.

37. Question: Section C.4.3.10 requires a separate “hands-on train-the-trainer” session for trainers that migrate from one search format to another. What percentage of the trainers do you estimate will need this cross training? Also, how many trainers do you estimate to migrate to different search formats per year and/or per platform? Can you provide any historical turnover-rate of “train-the-trainers?”

Response: “Train-the-trainers” will require training in all software versions. We expect a 10%-15% turnover of train-the-trainers from year to year.

38. Question: Section C.2.6.1 states that the IRS will release a separate Statement of Work addressing Asset/Locator research, when do you expect to release this Statement of Work?

Response: We anticipate issuing a Request for Information (RFI) in February 1999, and a Request for Proposal in June 1999.

39. Question: Also, in regards to Section C.2.6.1, will only the awardees of Tax Package 1,2,3 and 4 be considered for Tax Package 5?

Response: The Government intends to make four award decisions for this procurement. Please see solicitation Section 3.14, Technical Evaluation, regarding how the fourteen packages will be awarded. Awards may be made to the same vendor for more than one group.

40. Question: Section C.3.1 General Features list web-based products as a required platform. What browsers and their versions does the IRS use throughout its multiple locations for each of its operating systems?

Response: The IRS currently uses Netscape 3.01 and Microsoft Explorer for Windows NT 2.0.

41. Question: Section B, Exhibit A – Employee Profile Data, lists the number of employees for the Core Tax Package and the Accounting Library Package at a maximum of 60,000 employees. What is the maximum number of users expected to be accessing the Internet in the final year of the contract?

Response: Our vision is to migrate all employees to the “Intranet” by the year 2003.

42. Question: Section C.1.4.1.2 states the products must be usable on laptops and desktops with minimal hardware requirements. What are the current minimum hardware requirements for both laptops and desktops for all of your operating systems?

Response: The HQ2001 is a 386 DOS-based laptop with 80 MB of hard disk space and 12 MB of RAM. The replacement Windows NT laptop is a Pentium II, 266 MHz with 32 to 64 MB of

RAM and 2.1 GB of hard disk space. Desktops are currently being replaced with Windows NT Pentiums II, 266 MHz and 64 MB of RAM, with at least 2 GB of hard disk space. The Service also has a wide variety of other configurations, which are 386/486's running on both DOS and Windows platforms.

43. Question: Section C.1.4.1.10 requires the products to be “accessible to users with disabilities.” Is this vendor requirement mandatory or highly desirable? Also, does this apply to all 5 platforms?

Response: This is not a vendor requirement. It is an issue the IRS must address, and is provided in Section C.1.4.1 as information to Offerors.

44. Question: Is the requirement for the software platform of the standalone CD-ROM (Package #11 in Award Number #4) WIN/NT only or does it also need to be DOS, and ultimately, Web based?

Response: The CD-ROM for Package #11 (Award #4) needs to be compatible with the Windows NT operating system. Only a Windows based product will be considered for this package for the life of the contract. One format, one product and one contract.

45. Question: Is it required that any IRS DOS product run in a DOS format or must the program be written in DOS?

Response: Any DOS product required under this contract must run in a DOS format.

46. Question: From the Technical Requirements stated under Award Decision #4. Technical Requirements:

- a. What does the term ALL WINDOWS/WEB BASE mean? Do Windows based databases that go to the Web qualify?
- b. Does the IRS realize that the DOS based product will not have most of the functions stated in their highly desirable requirements?
- c. When the IRS states the product should “run on CD-ROM drive or fully functional when copied to the hard drive of the file server,” does it anticipate the program or the data being copied?
- d. What does the IRS mean by “spell check search term” feature? Does a word wheel that helps spell search terms qualify?
- e. What does the IRS mean by “Provide a desktop utility that automates the creation of links within a working WP/Word Doc?”
- f. For the Work Log and History, does a Folio Trail feature satisfy this requirement?
- g. What does “Customize Databases – Highly Desirable Functions” mean? Does it ask for databases designed by the publisher? Does it mean databases customized by the IRS?

Response:

a. Award decision #4, which is the Standalone CD-ROM Tax Library Source Documents (WIN/NT) Package, is required in Windows format. Web-based is not required for this product.

b. The IRS is aware of the diminished functionality of DOS based products when compared to Windows or Web- based products. It is for this reason that the IRS is migrating to Windows NT.

c. We would expect both the program and data to be copied to the hard disk. The IRS wants the option of copying the data directly from the CD-ROM products onto the hard drive(s) of a network file server under Award Group #1 and Award Group #3 only. Both the program (text retrieval software) and the data (text) would be copied to the file server. The intent is to reduce access time and data transfer rates normally associated with CD-ROM disc drives.

d. It is highly desirable that misspelled words input by the end user either be clearly identifiable or specifically identified. If your reference to a "word wheel" is one similar to that utilized by the Folio search engine (text retrieval software) the answer is yes. Such a "word wheel" would qualify as a clearly identifiable spell check feature. A prompt to an end user that a word does not exist in the database being searched (e.g., "The word LIABBILITY does not appear in the database you are searching") would qualify as a specifically identified spell check feature.

Although a word wheel has the capability to identify words in the system, we use the term "Spell Check" as similar to "Spell Check" in a word processing package such as Microsoft Word or WordPerfect. Spell check would identify words that are misspelled and provide options to select correctly spelled words prior to the employee conducting a search.

e. This question relates to section C.3.3.5 of the Electronic Research Features portion of the Statement of Work. The feature described is one that allows a user, completing a research paper using MS Word or WordPerfect, to automatically check any legal citations contained within the document. The purpose of this feature is to ascertain that the legal cite is accurate as to both form (i.e. it is a correct cite) and content (i.e. that the decision has not been subsequently overturned) by another court.

f. Note this is not a requirement, it is a "Highly Desirable" feature. If a "Folio Trail" is proposed, the Technical Evaluation Panel will evaluate whether a "Folio Trail" meets either one or both of the features listed.

g. As stated in response to question 5, Section C.3.11 is deleted from the solicitation.

47. Question: Technical proposal length is limited to 200 pages. If you are responding to only a portion of the solicitation, is the page length to be considered fifty pages per award?

Response: The entire technical proposal is limited to 200 pages. Any government required spreadsheets/exhibits for this procurement would be excluded from the technical proposal page limitation of 200. This limitation of 200 pages includes the entire technical proposal with no additional limits placed on the number of pages per Award.

48. Question: What is the maximum page length for the Business Proposal?

Response: There is no maximum page length established for the Business Proposal.

49. Question: For Award Decision #4, please define document type “ATG’s”.

Response: Section C.2.12.2.11 is revised to read: “MSSP ATG’s”. This research tool is an abbreviation for Market Segment Specialization Program Audit Technique Guides.

50. Question: “The fourteen electronic research packages have been divided into four groups. Offerors may include any/all of the four groups in their proposals.” Are bids proposed for each Group or by the individual package?

Response: Vendors must submit proposals on a “group” basis as opposed to a “package” basis. Vendors can submit proposals for any or all groups. However, all mandatory requirements within a group must be satisfied in order to be considered for that group.

51. Question: Concerning the required past performance requirement, a number of contracts have been entered into with customers subject to confidentiality. Is there a penalty for not releasing these details based on legality?

Response: Pursuant to solicitation Section 3.8.1, subsection 12, Offerors are required to provide information for each of their last five (5) agreements/contracts in chronological order by the beginning period-of-performance date for those that are completed or still in progress during the last three (3) years for the same or similar electronic research services as required in this solicitation. If an Offeror is legally prohibited from providing information on any of its last five agreements/contracts, list the sixth, seventh, etc. agreement/contract in chronological order (for a total of five references submitted) by the beginning period-of-performance date for those that are completed or still in progress during the last three (3) years for the same or similar electronic research services.

52. Question: Award #4, Package #11, requires that the CD-ROM perform parallel search citations. Is this a specific requirement for this package since it contains no court cases?

Response: The ability to search by parallel case citations is a highly desirable search feature and not a requirement. While Award #4 (Package #11) does not contain court cases it does contain some research tools (e.g., revenue rulings, actions on decisions, general counsel memoranda, and technical advice memoranda) where court decisions are referenced. It is highly desirable that given a case citation, the end user could locate all databases which reference that particular court case. Accordingly, even in this package, parallel search citations would be highly desirable, but not mandatory.

53. Question: Of the “Hands-on, Train the Trainer” sessions which take place in the 16 largest Post of Duty locations as defined by the IRS, are any of these locations international sites?

Response: No training site is located outside the United States. International employees will be trained in the 33 district locations and the National Office located in Washington D.C. Only the 16 largest posts of duty (PODs) within the 50 United States are being considered. PODs in Hawaii and Alaska would be excluded since their PODs would not qualify for the largest 16.

54. Question: Is the vendor responsible for training the trainer only, or is training to include the end user?

Response: Vendors are responsible for providing training to trainers only. Statement of Work section C.4.3 states that the vendor will be responsible for training IRS identified trainers (instructors). IRS instructors will be responsible for training all IRS end users. Please note, however, that the vendor is also responsible for providing printed material for every potential end user under section C.4.3.13 of the Statement of Work.

55. Question: Please define the management process to be used in providing editorial support.

Response: Section 6 – Editorial Support that is required under Volume I – Technical Proposal, states that the “discussion shall include the management process to be used and the personnel to be assigned”. Solicitation section C.4 requires the vendor to provide the IRS with the same level of editorial support customarily provided to the vendor’s commercial clients. The vendor is expected to describe the managerial oversight established to assure that the level of editorial support given to the IRS is properly monitored and maintained throughout the length of the contract.

56. Question: Section 3.8 Fourteen Electronic Research Packages in Four Different Groups and Section 3.14 Technical Evaluation: Section 3.8 states that Offeror’s may include any/all of the four groups in their proposals. Section 3.14.1.2 states that the awardee for Group #1 will not be considered for Group #3. If a single vendor can provide differing and contrasting viewpoints to the editorial/analytical tax service package (Tax Package #10), can a single vendor receive award for both group #1 and group #3?

Response: Yes, if the editorial and or analytical tool is not related to the same tool as described in Tax Package #1.

As an example, BNA in Package #1 would not qualify if used for Package #10, however, if the Federal Tax Coordinator or another like named product were proposed, then it would qualify.

57. Question: Section 3.14.1 Technical Evaluation: This section states that the government intends to make four award decisions for this procurement. Can you clarify if this means only one award per group will be made or is it possible that there will be multiple awards within each group?

Response: One award per group will be made.

58. Question: Section 3.18 Past Performance: Paragraph 2 states “Of the five (5) references submitted to D&B, three (3) will be randomly selected and interviewed by D&B”. Paragraph 4 states “Only two attempts will be made to contact the appropriate person for each client or customer. In the event that no information is received within the requested time after a second attempt, then it will be noted that no past performance was received from the particular client or customer”. Please clarify if any one or more of the three “randomly selected” references are not reached, will one or both of the other two references be contacted? Will interviews be conducted in the month of December when it is likely that many individuals will be on their government “use or lose” leave and not reachable. How will this affect the past performance evaluation?

Response: If any one or more of the three randomly selected references are not reached, one or both of the other two references will be contacted.

59. Question: Minimum Mandatory Specifications and Section C Statement of Work: There appear to be discrepancies between the mandatory requirements within these two documents. Certain sections in the Statement of Work use the word “shall” indicating this is a mandatory requirement, however, it is not listed in Section 3.19 Minimum Mandatory Requirements.

Response: Section C, Statement of Work, takes precedence over Section 3.19, Minimum Mandatory Requirements.

60. Question: Section 3.19 Minimum Mandatory Specifications – C.2.6.1.7 and Section C Statement of Work C.2.6.1.7: The Minimum Mandatory Specifications for C.2.6.1.7 reads “Books/Treaties/Magazines. Section C.2.6.1.7 in Statement of Work reads “Tax-Related Publications”. Please Clarify.

Response: Section C.2.6.1.7 (Statement of Work and Section 3.19) is hereby revised to read: Books/Treatises/Magazines that are Tax-Related.

61. Question: Section 3.19 Minimum Mandatory Specifications – C.4.3.9.3 This section states the “16 largest Post of Duty locations as defined by the IRS”. Please name the city locations for the 16 largest Post of Duty locations.

Response: Listed below are the training locations for the headquarters’ city of each of the 34 district offices, the National Office (Washington, DC), and the 16 largest Post of Duty locations as defined by the IRS:

Locations:

- ◆ Houston, TX
- ◆ Oklahoma City, OK
- ◆ Chicago, IL
- ◆ St. Louis, MO
- ◆ Milwaukee, WI
- ◆ St. Paul, MN
- ◆ Dallas, TX
- ◆ Austin, TX
- ◆ Austin Service Center
- ◆ Kansas City Service Center
- ◆ Brooklyn, NY
- ◆ Hartford, CT
- ◆ Manhattan, New York
- ◆ Detroit, MI
- ◆ Newark, NJ
- ◆ Boston, MA
- ◆ Cincinnati, OH
- ◆ Covington, KY
- ◆ Cleveland, OH
- ◆ Philadelphia, PA
- ◆ Philadelphia Service Center
- ◆ Pittsburgh, PA
- ◆ Buffalo, NY
- ◆ Andover Service Center, near Boston, MA
- ◆ Baltimore, MD
- ◆ Atlanta, GA
- ◆ Atlanta Service Center, Chamblee, GA

- ♦ New Orleans, LA
- ♦ Indianapolis, IN
- ♦ Nashville, TN
- ♦ Memphis Service Center
- ♦ Jacksonville, FL
- ♦ Greensboro, NC
- ♦ Fort Lauderdale, FL
- ♦ Tampa/St. Petersburg, FL
- ♦ Richmond, VA
- ♦ Los Angeles, CA
- ♦ Oakland, CA
- ♦ San Francisco, CA
- ♦ San Diego, CA
- ♦ Seattle, WA
- ♦ Denver, CO
- ♦ Laguna Niguel, CA
- ♦ Phoenix, AZ
- ♦ Brookhaven Service Center, Holtsville, NY
- ♦ Fresno Service Center, Fresno, CA
- ♦ Ogden Service Center, Ogden, UT
- ♦ Detroit Computing Center, Detroit, MI
- ♦ Martinsburg Computing Center, Martinsburg WV
- ♦ International Office, Washington, D.C.
- ♦ IRS National Office, Washington, D.C.

62. Question: Section C.1.4 Statement of Work – The IRS 1999 Electronic Research Capabilities: The numbering for items C.1.4.1.2 through C.1.4.1.9 has been duplicated and descriptions differ. How shall the vendor distinguish between these duplicate numbered items when referencing in the proposal?

Response: The Statement of Work is hereby revised at Section C.1.4 to revise the second set of numbering of C.1.4.1.2 through C.1.4.1.9 to read C.1.4.2 through C.1.4.9.

63. Question: Section C.2.2.2 Statement of Work – Core Tax Package: This section requires that the editorial/analytical tax service must be “linked” to the source documents. Section C.2.11.1 requests editorial and/or analytical tax service without any source materials. Should we assume that this editorial and/or analytical information is not required to be linked?

Response: You are correct, the section C.2.11.1 package does not require links to source documents. The intent of this package is to provide another research tool, an additional point of view, from that found in the Core Tax Package without duplicating the cost for access to source documents.

64. Question: Section C.2.3. Statement of Work – Revenue Agents Package
Section C.2.3.1.3.9 is missing under this package. Was this item inadvertently omitted?

Response: Section C.2.3.1.3.9 was inadvertently omitted. The Statement of Work is hereby revised to read: “C.2.3.1.3.9 – Reserved”

65. Question: Section C.2.15 Statement of Work – Office of Criminal Investigation Package: Section C.2.15.2.1 is missing under this package. Was this item inadvertently omitted?

Response: Section C.2.15.2.1 was inadvertently omitted. The Statement of Work is hereby revised to read: "C.2.15.2.1 – Reserved"

66. Question: Section C.3.1.1 Statement of Work – General Features: How many potential users are anticipated for each of the five platforms in each award group? This information is essential to estimate capacity requirements.

Response: Section B, Exhibit A contains information regarding potential users. The pricing sheets contain Base Line estimates of the number of concurrent users. Users will be profiled and assigned passwords and PIN numbers and may use more than one platform depending upon their location and equipment. A user could feasibly use the direct on-line connection, the CD-ROM housed on an IRS server not connected to the network, and the CD-ROM located on the IRS WAN. The Service wants to provide multiple options for conducting research. If a user cannot use one option because the total number of concurrent users are already logged on, the user could go to another option available, which may involve connecting to another part of the system in another region.

67. Question: Section C.3.1.1 Statement of Work – General Features: Are all materials requested in each of the 14 packages expected to be fully contained on each of the five required platforms?

Response: As stated in solicitation Section 3.14.4, Point Scored Evaluation, the following platforms are required for the fourteen tax packages:

CD-ROM DOS, CD-ROM WIN, ON-LINE DOS, ON-LINE WIN and WEB:

- Tax Package #1, Core Tax Package
- Tax Package #3, Employee Plans Package
- Tax Package #4, Exempt Organizations Package
- Tax Package #7, Excise Tax Package
- Tax Package #8, Employment Tax Package
- Tax Package #10, Editorial & Analytical

ON-LINE DOS, ON-LINE WIN and WEB:

- Tax Package #2, Revenue Agents Package
- Tax Package #5, Coordinated Examination Program Package
- Tax Package #6, Estate and Gift Tax Package
- Tax Package #9, Bankruptcy Law Package
- Tax Package #12, Accounting Library Package

ON-LINE WIN and WEB:

- Tax Package #13, Office of Chief Counsel and Appeals Package
- Tax Package #14, Office of Criminal Investigation Package

CD-ROM WIN:

- Tax Package #11, Standalone CD-ROM(s) Tax Library Source Documents

68. Question: Section C.3.1.3 Statement of Work – Dial-up Product(s)
Section C.3.1.3.2.2 is missing under Dial-up products. Was this item inadvertently omitted?

Response: Section C.3.1.3.2.2 was inadvertently omitted. The Statement of Work is hereby revised to read: “C.3.1.3.2.2 – Reserved”

69. Question: Section C.4.3 Statement of Work – Training Support: Section C.4.3.6 states “Contract performance will not begin until 30 days following the completion of the initial “basic” train-the-trainer sessions.” Please clarify the timetable for the start of the contract, the start of the training and the completion of the training.

Response: Section C.4.3.6 is hereby deleted in its entirety. We anticipate a contract award date of April 1, 1999. Training should commence within 30 days after contract award. Training should be completed within thirty days after commencement.

70. Question: Section C.4.3 Statement of Work – Training Support : Section C.4.3.15 states “Training for the base year will occur in approximately 51 locations with “Train-the-Trainer” instruction for approximately 612 Internal Revenue Service employees. The requirement for training in years 2-4 will be reduced to only training “Train-the-Trainers” lost through attrition. Please clarify if there will be any “end user” training expected at any time during the contract period.

Response: We expect the IRS Train-the-Trainers to be responsible for training all IRS employees. We anticipate a 10%-15% turnover of Train-the Trainers each year and would expect the vendors to provide software training in each of the renewal years to these employees.

71. Question: Section C – Statement of Work; Section B, Exhibit C – Detailed Pricing Worksheets; Exhibit C – Inventory Listing Worksheet. There appear to be discrepancies in the content requirements for the fourteen packages between these three documents. Please clarify the content requirements for the fourteen packages and provide consistency between the three documents.

Response: The Statement of Work (Section C) takes precedence over the Exhibits.

Additionally, the following changes are hereby incorporated into Section C, Statement of Work:

a. Revise Section C.2.2.1.1 to read as follows: A published analytical and/or explanatory tax service which compiles, digests and interprets the various sources of authority constituting the law of federal income, excise and estate & gift taxation, and

b. Revise Section C.2.7.1, last sentence to read: “The tax materials included in this product are considered highly desirable except for: State Codes and State Court Cases, which are mandatory.”

Note: One (1) point can be earned for each of the three highly desirable line items C.2.7.1.4 (1 point), C.2.7.1.5 (1 point) and C.2.7.1.6 (1 point) for a total of 3 possible points.

c. Add the following to Section C.2.8, Excise Tax Package:

C.2.8.1.2 Books/Treatises

C.2.8.1.3 Magazines/Newsletters

Note: One (1) point can be earned for each of these two additional highly desirable line items. The Excise Tax Package is revised to increase the total points available from 6 to 8.

d. Add the following to Section C.2.9, Employment Tax Package:

C.2.9.1.3 Books/Treatises

C.2.9.1.4 Magazines/Newsletters

Note: One (1) point can be earned for each of these two additional highly desirable line items. The Employment Tax Package is revised to increase the total points available from 10 to 12.

e. The items contained under C.2.13.4 and C.2.13.5 are examples only for the vendor to consider.

72. Question: Exhibit C - Detailed Pricing Worksheet: This worksheet requires vendors to individually price the components of each product package and does not provide the opportunity to offer an overall package discount. This is not standard commercial pricing practices, and will not provide the IRS the best overall pricing. Vendor is concerned that the government might select less than the total package. Would the government consider allowing vendor to price the individual components based on their individual value and provide a total discounted package price as a separate line on the worksheet which would then be rolled up to Exhibit B? Or can the government assure vendors that the total packages will be purchased?

Response: The Government is looking for the solution that provides the best value to the Internal Revenue Service over a potential 4-year period. Therefore, the Government will accept alternate price proposals. The price for any alternate proposal must conform to the performance period stated in the RFP – a base year and three option years. Alternate proposals must be priced in a manner that allows the Government to readily identify and evaluate the proposal pricing data. Alternate proposals will be evaluated based on the evaluation criteria detailed in the RFP.

The alternate proposal shall contain Exhibit C as Table 1, to show the individual component prices. In the event that there is no charge for an item, the Offeror shall so stipulate by placing the acronym “N/C” in the appropriate description column. In an instance where “N/C” is entered, the Government will have the right to order that item from the successful Offeror at no charge to the Government. In the event that there is an item proposed, that is not separately priced, the Offeror shall so stipulate by placing the acronym “NSP” in the appropriate description column.

The Offeror shall prepare a cross reference table, Table 2, which indicates where, in the alternate proposal, each requirement in Section C is priced. The Offeror shall submit Table 1 in hardcopy and on diskette. All requirements in Section C must be addressed in Table 1, clearly identifying the proposal line item that satisfies the requirement.

73. Question: Exhibit C - Inventory Listing Worksheet: Should this worksheet be submitted in the Technical Volume? If so, which section?

Response: These worksheets should be submitted in the Technical Volume. The solicitation is hereby revised to add subsection 13 to Section 3.8.1, Volume I – Technical Proposal. In subsection 13, provide the completed Inventory Listing Worksheets (Section C, Exhibit C). Please note: The Inventory Listing Worksheets are not included in the technical proposal page limitation of 200.

74. Question: Section B Statement of Work – Pricing: Section B.1.10 states that vendors shall propose prices on a monthly per user rate for each platform. Does “monthly per user rate” mean monthly per “concurrent” user rate?

Response: As stated in the response to question 2, vendors shall propose prices on a monthly concurrent-user rate for each platform within each package proposed for the base year and the three option years.

75. Question: Exhibit B – Pricing Worksheets: Exhibit B requests separate pricing for concurrent users for Online DOS, Online Windows and Web-based. Standard commercial practice assumes a platform neutral environment and does not distinguish pricing by access method. How would the IRS suggest vendor complete Exhibit B?

Response: The question is interpreted that the vendor's price is the same no matter what software is used at a particular concurrent user rate. If this is a correct interpretation, the vendor should still complete the line items for each platform. In the case of neutral environment between pricing platforms access method, the vendor should so note in their response, however, the vendor must include the price in the breakdown of each platform and concurrent user line item.

76. Question: General: If an alternate solution can provide a better overall value to the government than the requested structure, will the government accept and evaluate an alternate solution?

Response: Please see response to question No. 72 regarding alternate proposals. Any alternate proposal received must meet the Government's minimum mandatory requirements in order to be considered acceptable.

77. Question: General: Does the IRS intend to allow other offices and/or agencies to use this contract?

Response: The electronic research services acquired through this procurement are limited to employees of the Internal Revenue Service.

78. Question: General: News documents are identified as mandatory or highly desirable in several locations in the solicitation. Do these requirements pertain only to tax-related topics, package topic or a broader news offering?

Response: These pertain to a broader news offering. Vendors should provide details and pricing for each offering.

79. Question: Is there any difference in capability limitation between personnel using dial-up vs. individuals accessing via the WAN (i.e., can they get to commercial services). Please provide the # of personnel using dial-up.

Response: All regions have equipment to house CD-ROM tax research material on their WAN. Dial-up will be used as a backup or other option to "users" using the WAN. The purpose of the "Standalone CD-ROM" package is to have employees working outside the office (flexiplace) to be able to conduct research without either dialing into a dial-up vendor or dialing into an IRS standalone file server containing CD-ROM vendor information. We are replacing our outdated equipment (HQ2001), the prime source of Online dial up, before January 2000.

80. Question: What are the average # of searches anticipated for each concurrent user or the average number of actual individual end users that you anticipate for each concurrent user?

Response: Between Midstates and Western regions, we average approximately 52 concurrent users of tax research software at any one time. We would predict the same results for both Northeast and Southeast regions. Refer to Exhibit A of Section B for the Service's estimate of potential users.

81. Question: Section 3.8 Proposal Preparation Instructions: Section 3.8.1 Volume I – Technical Proposals: Since the Executive Summary is requested prior to the Table of Contents in Section 2, may we assume that neither the Table of Contents nor the Executive Summary will be included in the page count?

Response: The Table of Contents and the Executive Summary are included in the technical proposal page limitation of 200.

82. Question: The IRS 1999 Electronic Research Capabilities, Section C.1.4.1.5 – Provides online research of IRM: Please define “IRM” as referred to in this requirement?

Response: The IRM is defined as the “Internal Revenue Manual”.

83. Question: Section C.2.2.10.2 Core Tax Package: Is the “United States Tax Court” the same as “The Tax Court of the United States” in C.2.2.10.3? If not, what is the difference?

Response: Prior to 1943, the Tax Court was known as the Board of Tax Appeals (B.T.A.). In the latter part of 1942, Congress changed the name of the court to the Tax Court of the United States. Finally, on January 1, 1970, the court received its present name: The United States Tax Court. In preparing this solicitation, the IRS used the official titles of the court for clarity to assure that complete coverage of all “tax court” cases, for all years, were available.

Both C.2.2.10.2 and C.2.2.10.3 refer to the same requirement. These titles are used interchangeably, so both have been provided. A vendor may cite both C.2.2.10.2 and C.2.2.10.3 in responding to this requirement.

84. Question: Section C.2.8.1.1 Excise Tax Package
This section lists the “Excise Tax Reference Guide.” Is this a specific title or a generic title?

Response: This is a generic title. Section C.2.8.1.1 is hereby revised to read: “A reference guide or handbook covering Excise taxes.”

85. Question: Section C.3.1.1.1, Electronic Research Features: Does the Requirement that a research service run on Windows NT 4.0 apply to:

- a. The portions of the research service that run on the customer desktop?
- b. The parts of the system that would run on servers in an IRS data center?
- c. The portions of a research service that runs in the vendor's own data center?

Response: a. Yes

b. Yes

c. No, as long as the software used by the vendor in its own data center does not preclude access from computers that run on Windows NT 4.0.

86. Question: Section C.3.3.5 Electronic Research Capabilities – Linking

a. Would the vendor need to support multiple versions of the word processors listed? If so which ones?

b. Would the IRS consider access from Windows word processors to vendor's web-based services as a first step toward meeting this request?

Response: a. The vendor will need to support multiple versions of the word processors. Versions are as follows: Microsoft Word 95, Microsoft Word 97, and Word Perfect versions 7 and 8.

b. If this process were proposed, it would be considered during technical evaluation.

87. Question: Section C.3.5.2 Electronic Research Capabilities – Saving: What is a “blocked/partial” text format?

Response: The product should allow the user to save only that portion of a document deemed necessary to the end user, directly into a word processing format, such as MS Word or WordPerfect. The ability to save an entire document to a clipboard or notepad first, in order to edit/delete unwanted portions of the document would meet the requirement of Section C.3.5.2 of the Statement of Work, but not section C.3.5.3.

88. Question: Section C.4.3 Training Support: Please confirm whether C.4.3.15 should be a mandatory requirement. It is not listed in Section 3.19, Minimum Mandatory Specifications, although all other training requirements are listed in that section. If it is not a mandatory requirement and is highly desirable, how many points are available for evaluation?

Response: Section C.4.3.15 is a mandatory requirement. Section C (Statement of Work) takes precedence over Section 3.19.

89. Question: If vendor can supply licensed data to the IRS in a flat rate contract would the IRS consider paying the publisher directly?

Response: No, the contract, including all terms and conditions would be between the IRS and the successful Offeror.

90. Question: Can a vendor “team” with another vendor to bid on an individual or multiple award groups?

Response: The proposal would need to be submitted by one Offeror and would be evaluated as submitted by that Offeror. The Offeror would be responsible for making appropriate arrangements with any other vendors it contracts with in satisfying the Government's requirements.

91. **Question:** Can a vendor bid independently for an award group and also “team” with another vendor on the same award group by providing said vendor with “content” for their bid?

Response: This is acceptable. The proposal would need to be submitted by one Offeror and would be evaluated as submitted by that Offeror. The Offeror would be responsible for making appropriate arrangements with any other vendors it contracts with in satisfying the Government’s requirements.

92. **Question:** Can a qualified, registered vendor “team” with a vendor that did not initially respond to the Solicitation? This would be a back door approach to either qualify a registered vendor for an award group that they otherwise could not bid or to bring a vendor that did not respond to the Solicitation into the bid by “teaming” them with a qualified vendor. As an example: Vendor A has no “standalone CD product” to qualify to bid on Award Category 4. They offer vendor B, who did not respond to the Solicitation but offers a standalone CD product, the opportunity to “team” with them to benefit both vendors.

Response: Proposals received prior to the date and time set for receipt of proposals will be accepted and evaluated by the Government, whether or not a vendor has responded to the Solicitation. With respect to the “teaming” arrangement, the proposal would need to be submitted by one Offeror and would be evaluated as submitted by that Offeror. The Offeror would be responsible for making appropriate arrangements with any other vendors it contracts with in satisfying the Government’s requirements.